

Federal-State Market Improvement Project 2005-2006

Regional Marketing of Fresh New Mexico Green Chile

Final Report: Analysis and Outcomes

Presented by:

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May 5, 2006

ABSTRACT

The Chile Industry in New Mexico has evolved from a coveted spice used by the ancient Anazazi Indian Culture in the early ninth century to a multifaceted value added industry with an economic impact of over 200 million dollars to the state. The Chile Industry is much diversified, representing five major categories; fresh red cayenne, green jalapeno for processing, dehydrated red chile, paprika, and green chile for processing. The focus of this proposal will be directed toward the underserved segment of this industry, green chile for the fresh market.

New Mexico is the fifth largest state in the United States (U.S.), with a population base of approximately 1.85 million. This population base has experienced double digit growth in the past decade, attributed to relocation for retirement, open spaces, jobs, and weather attributes. A common thread among this group is the passion quickly developed for fresh green chile. Once acclimated to this traditional taste of New Mexico, this new segment of the population has become loyal consumers. Conversely, the outgoing segment seeking relocation carries this loyalty and 'addiction' for green chile to their new destinations.

Although demand is fairly constant within and surrounding the production areas, the desire to expand marketing channels regionally and nationally presents new constraints to current marketing practices. These constraints are outmoded packaging, handling and storage concerns, and the marketing challenges associated with the introduction of a traditional local product into nontraditional regional and national markets. In an effort to establish market share for New Mexico green chile in regional markets we will address these constraints through identification of the logistics and distribution system in which 'cold chain' principals could be applied. Also, the development of retailer interest and education and also training of handling and merchandising green chile will need to be addressed. By educating the consumer on preparation and usage, increased awareness will result in satisfaction, confidence, and loyalty in the marketing channels. The timing of this initiative is imperative to the success of New Mexico's chile industry, whose boundaries extend into and impact Arizona and West Texas.

Research Priorities – Quality and Packaging

The majority of fresh vegetables grown and/or imported in the U.S. have established standardized quality standards provided by the United States Department of Agriculture (USDA). These grade standards provide uniform nomenclature and guidelines for quality attributes for each vegetable and are recognized as an effective marketing tool. Identification of major barriers to the New Mexico Chile Industry by the New Mexico Chile Task Force (*Report 11, Developing New Marketing Strategies for the Southwestern Chile Industry*, December 2003) acknowledged the resistance to standardization and confusing and misleading nomenclature as two leading causes. However, not mentioned were the need for innovative packaging, improved handling, and storage concerns to enhance and maintain the quality of the product. Current practices which reflect the above causes will continue to be an impediment to the expansion of the chile industry.

Goal: Research Component – Evaluation of Quality aspects of green chile through identification of handling and storage requirements, as well as new packaging alternatives.

Objective 1.)

Current handling and storage practices are not conducive in providing the consumer with the freshest product available. The seasonality and regionality of fresh green chile is a highly probable cause of the neglect and misinformation associated with this perishable commodity. We are seeking to provide research based “cold chain” data to educate producers, processors, wholesalers, distributors, retailers, and consumers.

Objective 2.) The overwhelming majority of fresh green chile from New Mexico has been and continues to be marketed in the same manner as it was 75 years ago, in burlap sacks. The bulkiness of the sacks causes handling concerns, as well as reduced product quality caused by crushing and aeration. A few of the more progressive marketing firms have experimented with boxes, but vary in size, weight, and style, thereby lending greater confusion. A determination of an industry driven, retailer accepted container, that is ultimately consumer friendly is the most desired outcome.

Research Priorities – Competitiveness and New Markets

This is an integral part of the market development for the fresh green chile industry. In New Mexico, with its rich tricultural heritage, fresh green chile is a traditional component of our historical background. Herein lies the challenge before us, the traditional food we understand and love in New Mexico is perceived outside of our immediate borders as a nontraditional food, which is misunderstood through preparation techniques, heat levels, consumption, and handling. This perception extends from the wholesaler/distributor, retailer, and ultimately, the final consumer. As we move into new markets, addressing these misperceptions will be paramount to the success of our ability to initiate and maintain competitiveness in this venue. Tastes and preferences, in the case of fresh green chile, will be focused on mild, medium, or hot. This assessment will be critical in addressing the demands of each new market and refining current market needs. A concurrent evaluation of consumer response to the generic marketing campaign of “New Mexico Green Chile” will further identify access to new markets and delineate the competition. This information will establish a baseline for continued efforts toward regional as well as national recognition.

Goal: Establish market share for New Mexico green chile in Regional Markets.

Objective 1.) Develop retailer interest through promotional activities involving seasonality issues, availability, and festivals.

Objective 2.) Educate and train retail store personnel on preferred methods of handling and merchandising of green chile.

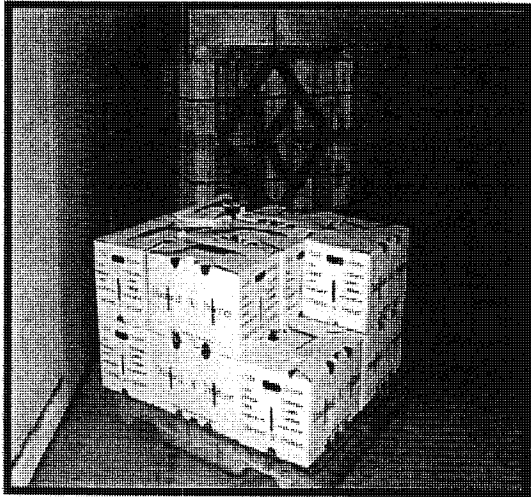
Objective 3.) Develop and increase consumer awareness and loyalty through education and the preparation and usage of green chile.

Results and Observations for Quality and Packaging

Handling and Storage of New Mexico Green Chiles

The current method of harvesting fresh green chiles is as it has been for the last four centuries, by hand. It will continue this way until mechanization can produce the same results and quality. Historically, for the fresh market, harvest and packaging has been achieved in the field. Fresh green chiles are hand picked and put into burlap sacks which hold between 35 and 40 pounds of chile. When harvest is completed for the day, the burlap sacks are loaded onto a trailer and transported to the marketing facility, generally the farmers shaded area for distribution. At this time the bags are stacked on pallets (35-40 per pallet). These bulky burlap sacks are hard to stack and offer no protection from crushing and bruising. The ambient open air storage also results in rapid deterioration of quality. Fresh green chiles lose water very quickly after harvest and begin to turn color within a few days without refrigeration.





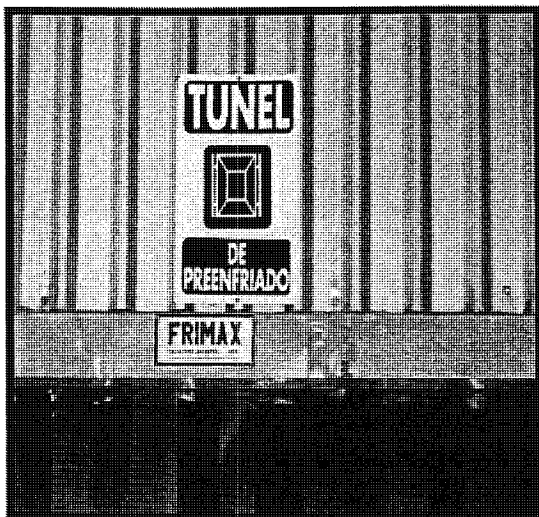
During the evaluation process, the fresh green chiles were hand picked and loaded in large bins for transport to the packing facility. At the packing facility, the chiles were washed, sorted, and graded according to buyer specifications. They were then packaged into fiberboard cartons which contained either 25 or 35 pounds of fresh green chile, depending on the size of the carton. These cartons were stacked on pallets, secured with a netting wrap, and placed in refrigerated storage at 40 degrees F prior to shipment. The minimum precooling period of six hours was required before loading onto a refrigerated carrier.

The mechanical refrigeration unit on the carrier was set at 45 degrees F to be maintained during shipment. The transit time varied from 1-3 days, depending on destination. Upon receipt at the warehouse or distribution center, the fresh green chiles were kept in a controlled storage atmosphere with temperatures maintained at 45 degrees F. When the chiles arrived at the retail stores for promotion, they were again placed in a cold storage facility prior to being put on retail display in the produce section. There was very minimal loss in weight due to transpiration and the quality was exceptional and well received by consumers.



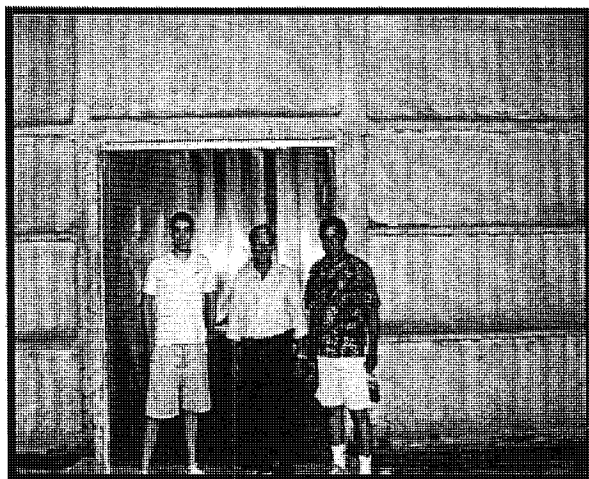
To corroborate our findings and evaluate new and improved methods of handling and packaging, we implemented an international component in our evaluation. Production of fresh peppers is limited in scope to warm climate production areas and seasonal limitations. Further limiting this scope is the commercial production of fresh green chiles for the fresh market. The only other major production area outside of New Mexico that has expertise in fresh market handling and storage is Mexico. Due to the distances from production areas to large markets within Mexico and export destinations in the United States, we felt the techniques used in Mexico

would be most conducive to application for our fresh green chile industry in New Mexico as we move into distant markets.



The methodology used in Mexico was very similar to the evaluation we conducted in New Mexico during our harvest season. The chiles were hand harvested, placed in small recycled plastic containers (RPC's) and transported to the packing facility where they were washed and sorted. After grading and packaging (several different types), they were palletized, wrapped, and transferred to a precooling facility. This precooling facility was not the refrigerated storage room, but rather a separate facility specifically designed to remove the field heat and minimize any weight loss due to transpiration. This was accomplished through a forced air tunnel in which refrigerated air is moved through a covered device

representing a tunnel in which the cold air is forced through the chiles with the aid of two large fans acting in concert with each other, one pushing the air through the chiles and the other assisting the push by pulling the air through. The temperature of the refrigerated air was maintained at 42 degrees F. The average precooling period with this process is about one hour, which is considerably less than what we experienced in New Mexico.

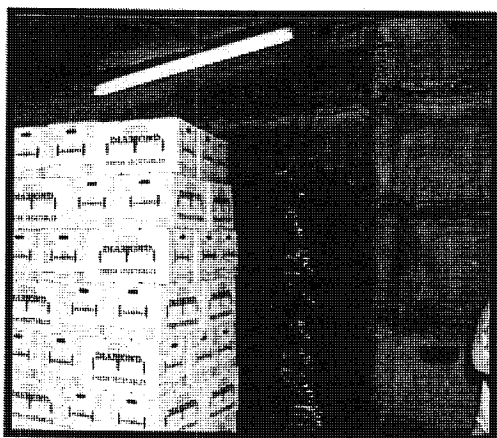


Once this process is completed, the chile is transferred to the refrigerated storage facility with the temperature maintained at 42 degrees F prior to shipment to distant markets. The forced air precooling process not only removes the field heat and slows down the transpiration process, but also allows the refrigerated storage to operate more efficiently. This also prevents intermingling of hot and cold product which puts additional stress on the refrigeration units. More importantly, it provides an added assurance that all chiles are precooled properly and, therefore, lessens the chance for deterioration upon arrival at destination markets, which in their case can be

from 4-10 days from shipment at the packing facility. Another requirement before the shipment leaves the packing facility is the insertion of a temperature recording device in the refrigerated carrier to record any variations in temperature during transit.

Prior to the upcoming harvest season for fresh green chiles, our shippers and receivers will be informed of our observations in Mexico, noting specifically the application and use of forced air cooling and utilization of temperature recording devices to accompany their shipments.

Packaging of Fresh New Mexico Green Chile



As previously mentioned, burlap sacks, both new and used (usually potato sacks), were the most common and recognized packaging for New Mexico fresh green chile. This container, although sometimes associated with the authenticity of New Mexico green chile, has its benefits, but also several drawbacks. The benefit of an inexpensive, reusable, and arable container has been proven effective in marketing fresh green chile locally and within the state. As we move into regional and more distant markets, the drawbacks to this packaging become more evident. Damage from crushing and bruising caused from the unstable stacking characteristics of the

burlap sack results in lower quality and diminished sales at the retail level. Some shippers have used fiberboard cartons that vary in size from 1 and 1/9 bushel by volume and several types and sizes that hold 20, 25, or 30 pounds of chile in each box. Stack ability, reduction of crushing, and bruising are major reasons to utilize this type of packaging over the conventional burlap bag, especially to distant markets. Our evaluation was focused toward the 1 and 1/9 bushel carton with 25 pounds of chile in each box. This size and type of box is very suitable for most applications and regional markets.

From our international observations, several types, sizes, and materials were used, each dependant on the market or retail chain. RPC's were evident, as well as the standard wooden crates, poly mesh sacks, and several types of fiberboard cartons. The two main types of fiberboard cartons in use were the industry standard 1 and 1/9 bushel carton and a new 4.99 kg carton used mostly for colored bell peppers.



Due to the positive response we received from our consumer survey, most consumers in our regional survey loved the fresh green chile. However, their buying habits were far different than those in New Mexico and surrounding border areas where consumers purchase from 100 to 400 pounds annually. From the results of the consumer survey during our promotional efforts, the majority of the consumers were purchasing 10 pounds of chile or less. The original intent of the promotion was to sell full boxes of roasted chile to each consumer. These consumers in the urban areas loved the chile, but had limited freezer space. To address the needs of the consumer in these and other urban areas we are recommending to our shippers to add a 10 pound carton to their line of packaging to increase their market share in these areas.



Results and Observations on Market Share and Retailer/Consumer Education

Primary constraints which needed to be addressed included:

- Marketing green chile, a local traditional product into nontraditional regional markets where the broker, retailer, and consumer know very little about New Mexico green chile, much less how to use it to prepare a meal.
- Obtaining shelf space in retail stores.
- Obtaining a commitment from the shipper, broker, and retailer to allocate resources in order to establish demand and a long-term market.
- Out mode packaging – shippers in New Mexico are not accustomed to packaging and shipping fresh green chile to regional markets.

Taking this into consideration, marketing staff at the New Mexico Department of Agriculture (NMDA) met with three major shippers and one broker to discuss the promotion and target a five-states region (Texas, California, Colorado, Kansas, and Nebraska). Each entity, of course, had different needs and ideas. It was difficult to discuss markets, buyers, and prices due to the competitiveness of the business. However, each one was committed to establishing a long-term market for the fresh green chile.

The Promotion

After several meetings and much discussion, NMDA took the lead in implementing the 2005 New Mexico Green Chile Retail Promotion in the five regional markets. The promotion would include retail promo kits, co-op advertising, in-store promotions, presentations to retailers, and



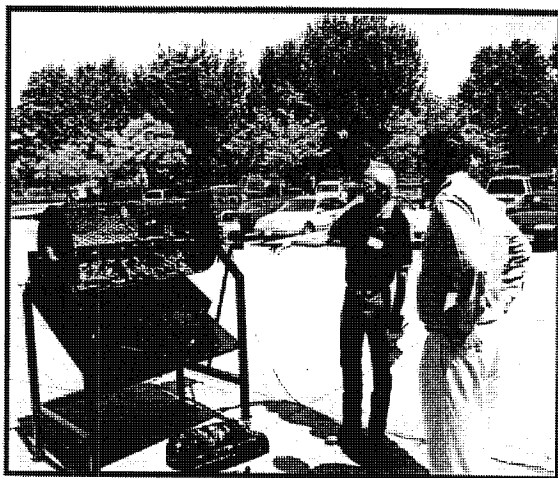
training for retailers. The promotion included 3 shippers, 1 broker, 41 growers, 11 major retail chains which included Raley's, HEB, HEB-Central Markets, Scolari's, Balls Food Stores, Tony's Fine Foods, Food 4 Less, Whole Foods, Johnson's Garden Centers, and Associated Foods (2200 stores), and with tremendous effort from NMDA marketing staff. The project started in July 2005 and ran through October 2005. Funding was cooperatively provided by the shippers, brokers, retailers, the New Mexico Chile Commission, NMDA, and a grant from the Federal-State Market Improvement Program.

Innovative Marketing Techniques

New Mexico green chile, being a nontraditional food in the markets selected, offered a tremendous challenge in establishing long-term market share. The very first obstacle to overcome was obtaining a full commitment from the growers and shippers. This included changing the packaging from burlap bags to 25 pound boxes with proper labeling and net weight statements. Then it was important to establish quality controls and ship only top quality chile peppers. The shippers were required to run the chile through a sorting and grading process and ship only fresh quality peppers. Once this was addressed, the following innovative techniques were utilized:

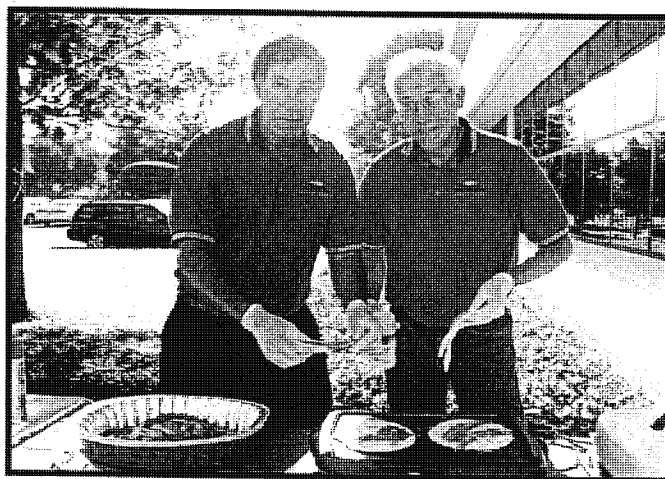


- **Identify and work with a "bird dog" to have access to retailers.** By working the NEW MEXICO-Grown with Tradition® (NM-GWT) Pavilion at the Produce Marketing Association (PMA) Trade Shows, we established an excellent relationship with a broker in California and buyers in Colorado, Kansas, and Texas. These individuals were sold on New Mexico green chile and were committed to establish shelf space and long-term markets for the fresh New Mexico green chile. Without their efforts and commitment, it would have been difficult to enjoy the success we did.
- **Educate and train retail store personnel on preferred and proven methods of handling and merchandising New Mexico green chile.** If the store management and personnel are not excited about the promotion, it stands a good chance to fail. Working with the broker and buyers, NMDA marketing staff traveled to the corporate headquarters to introduce the New Mexico green chile, the chile roasters, POP materials, and ourselves as representatives of the growers in New Mexico. All store directors/managers, produce managers, produce merchandisers, CEO's, and support staff at corporate headquarters were invited to attend.



everyone. This "showcase" proved to be a fun, out of the ordinary event which positively and successfully impacted on store personnel. The event was demanding on the staff but was extremely successful in setting the stage for a New Mexico Green Chile promotion by getting everyone on board.

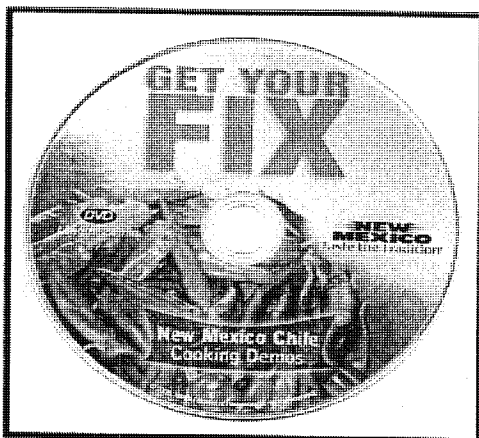
We demonstrated proper use of the chile roasters, how to handle, peel, and store the roasted green chile, showcased our POP materials including cooking DVD's, recipes, freezing instructions, and signage. We answered questions and made suggestions. At the end, we prepared "green chile quesadillas" and served



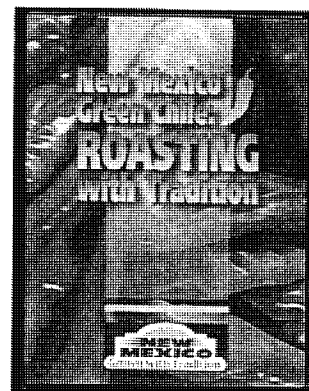
- **Provided chile roasters to retailers.** The participating shippers provided custom built chile roasters to their retailers. This was critical to the success of the promotion because the roasters draw attention, bring in buyers, and encourage consumers to buy full 25 pound boxes of green chile.
- **Developed the "Get Your Fix" slogan for the New Mexico Green Chile promotion.** Consumers who have enjoyed green chile can easily relate to the slogan and new consumers are attracted and soon will understand how addictive New Mexico green chile can be.



- **Chile roasting DVD's to train store personnel.** All stores with chile roasters received a video and written instructions on how to roast the green chile and handle it after. In addition, we conducted training sessions at the different stores to make sure the store was preparing and selling top quality green chile.



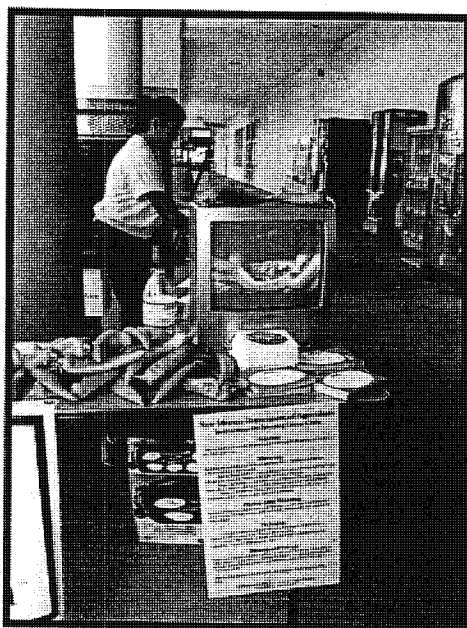
- **Chile cooking DVD's to educate consumers on how to cook with New Mexico green chile.**



We knew that establishment of long-term market share was very dependent on how initial sales went at the retail level. In order to attract consumers and establish consumer loyalty in the future, we developed a practical DVD which taught consumers how to prepare three basic, yet very popular chile dishes – “Green chile

stew”, Green chile enchiladas”, and “Chile rellenos”. Also, to not intimidate the consumer, we selected just “everyday folks” to prepare the chile dishes on the DVD.

Approximately 180,000 DVD's were distributed at the retail level. The feed back was tremendous! The retailers loved the DVD as a marketing, educational, and PR tool and the consumers welcomed it as a guide to preparing “exotic chile dishes”. (Most consumers asked for an extra DVD to send to a friend or family member.)



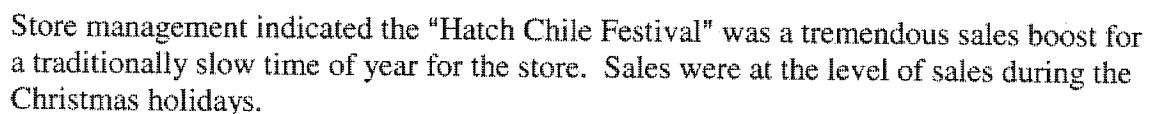
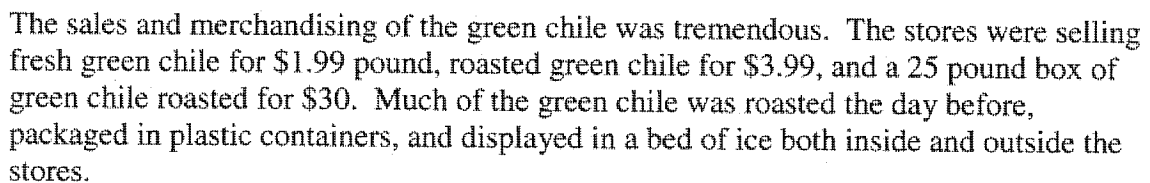
- **In-store sampling and showing the cooking DVD's in the stores.** Retailers have always said, “If you sample, you sell”, it's true, but we took it a step further and combined the chile roasting (attracts people), sampling, and televisions with built in DVD players showing the cooking DVD. In summation, the consumer enjoyed the **New Mexico Green Chile Experience:**

- ▶ large displays of green chile
- ▶ chile roasters
- ▶ sampling of the roasted green chile
- ▶ introduction to the cooking DVD
- ▶ free DVD's, recipes, and freezing instructions

- **Promo kits** - Over 2200 promo kits were sent to retailers. The promo kits included NM-GWT banners, and signs, recipes, freezing instructions, DVD's, and "Get Your Fix" T-shirts. The promo kits were extremely popular and created tremendous consumer interest for the nontraditional green chile. (Our secretary of agriculture even received feedback from his counterpart in California about seeing the NM-GWT logo, the New Mexico green chiles, and the "barbequing" of green chile at a Raley's Supermarket in Sacramento).
- **Cooperative advertising** - Working with two different chile shippers, we provided some matching money through our specialty crops program to advertise and promote the New Mexico green chile. The funding was used for newspaper ads and in-store publications. One retailer, HEB-Central Markets, used the funding to promote a two weekend chile festival.



- **Hatch Chile Festival** - Working with Skyline Produce, a shipper from Hatch, New Mexico, (area in New Mexico known for their green chile) and HEB-Central Markets in Austin, San Antonio, Dallas, Ft. Worth, and Houston, Texas, a two weekend "Hatch Chile Festival" promotion was held. The promotion included large banners and signage, chile roasting, huge chile displays, merchandising roasted green chile, colorful signs providing information on the history of green chile, and a menu from the store restaurants and sidewalk grills featuring over 20 products with green chile including

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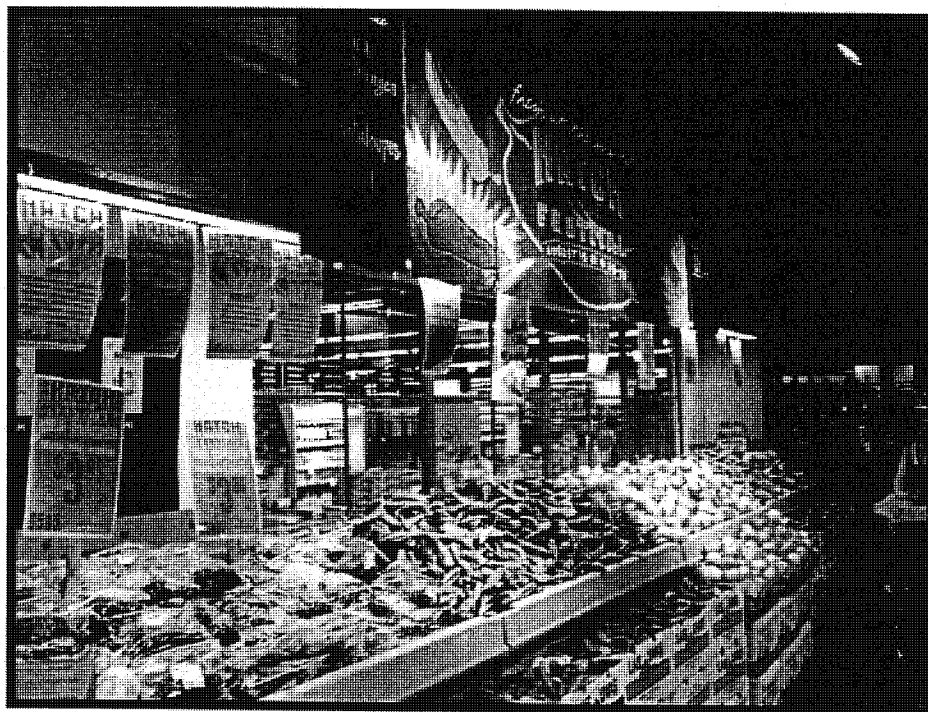
- **Conducted a consumer survey** at the retail level which addressed chile prices, quality, purchases, and demand. The consumer survey provided important insights and data to assist in the future marketing of New Mexico Green Chile.

Project Results

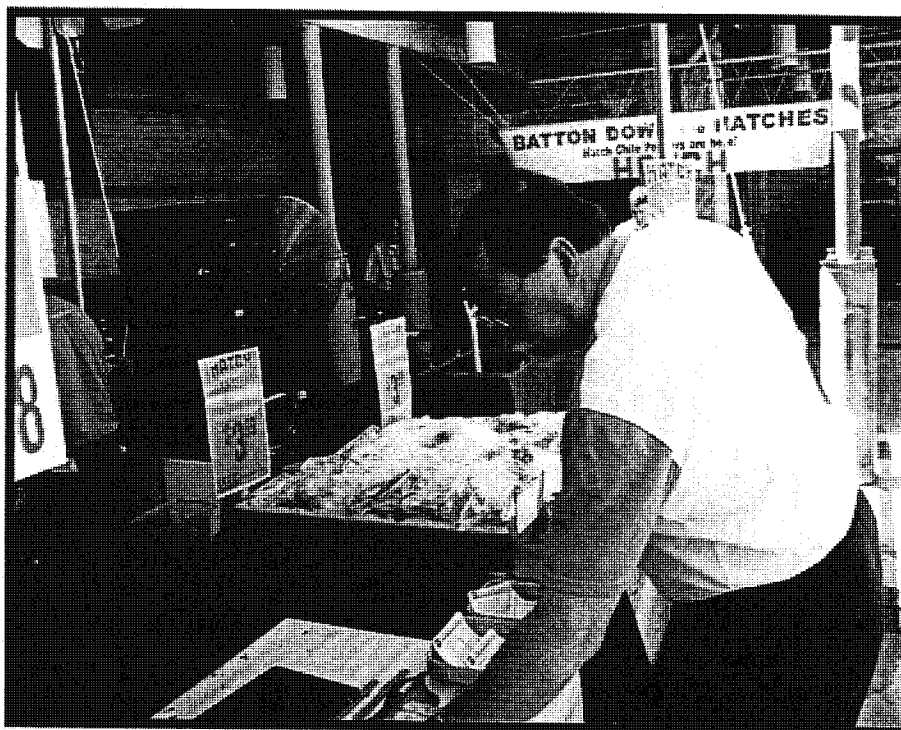
- Market share, with a tremendous potential for future growth, was established for New Mexico green chile. This will prove to be a tremendous boost to the fresh green chile grower allowing New Mexico to compete and succeed against chile imports from Mexico and other countries.



- The foundation for cooperative marketing/sales activities between NMDA, New Mexico growers/shippers, produce brokers, and retailers in the five-states region was established.



- Consumer awareness and loyalty for New Mexico green chile was established.



- The "New Mexico Green Chile Promotion" included:
 - \$19,600,000 in retail sales
 - 45 growers/shippers
 - 1850 retail stores
 - 560 truckloads sold
 - 2200 promo kits
 - 180,000 cooking DVD's
 - 5000 Roasting DVD's
- **Marketing techniques used proved to be successful.** They addressed the needs of growers, shippers, brokers, retailers, and consumers.
- **A new package design for fresh green chile was established.** Most shippers are now using a 25 pound box. Also, as a result of the promotion, some shippers are considering using an 11 pound box for specific markets.

Contribution of private cooperators

The New Mexico Chile Commission, shippers, brokers, and retail stores shared the cost of advertising and promotion with NMDA. Their contribution exceeded \$125,000 of true costs, plus facilities and personnel

Recommendation for future research activities

This initial promotion and research only started a sales campaign which has a tremendous potential for rapid growth. To maintain market share, through identifying and capturing new markets, a strong commitment to education, training, advertising/promotion, and market development is needed. Targeting the wholesale industry is also important in increasing distribution on a national level.

Project Beneficiaries

The following entities benefited from the Regional Green Chile Marketing Project:

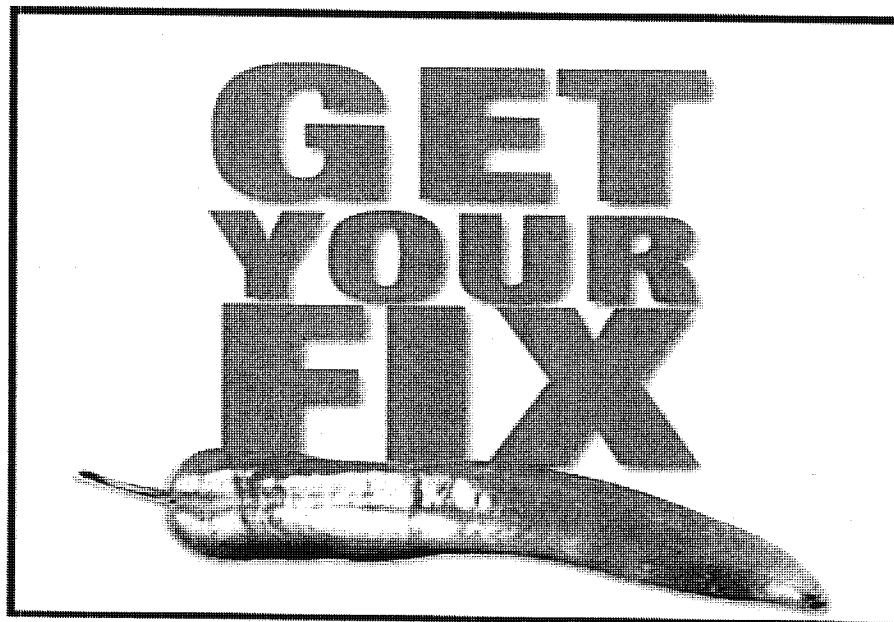
- **Forty-one green chile growers** – These growers are primarily family farms with 10-300 acres of production.
- **Three green chile shippers** – These shippers are small to medium size businesses with limited, but growing regional distribution.
- **One broker** – This broker has extensive experience in the retail and produce arena in California.
- **Eleven major retail supermarket chains** – representing over 2200 stores regionally.

- The U.S. Chile Industry has benefited from the increased demand created from this project.
- The U.S. consumer was introduced to a nontraditional, exotic, and nutritious fruit referred to as green chile, which is often mistaken as a vegetable.

Contact Persons for the Project

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Consumer Survey for Chile Promotion

Questions:

Is this your first purchase of *New Mexico Chile*? ☐ Yes ☐ No

If no, how long have you been buying *New Mexico Chile*? _____

Where did you hear about *New Mexico Chile*?

☐ Newspaper ☐ Radio ☐ In-Store ☐ Television ☐ Other

How much did you buy? ☐ Less than 10 lbs ☐ 25 lbs

☐ 50 lbs

☐ Over 50 lbs

What "heat" did you buy? ☐ Hot ☐ Mild ☐ Medium ☐ Mixture

What did you think of the pricing? ☐ Low ☐ Fair ☐ High

What was the quality of the Chile? ☐ Poor ☐ Good ☐ Excellent

Did you have the opportunity to watch the cooking DVD? ☐ Yes ☐ No

If yes, was the DVD informative? ☐ Yes ☐ No

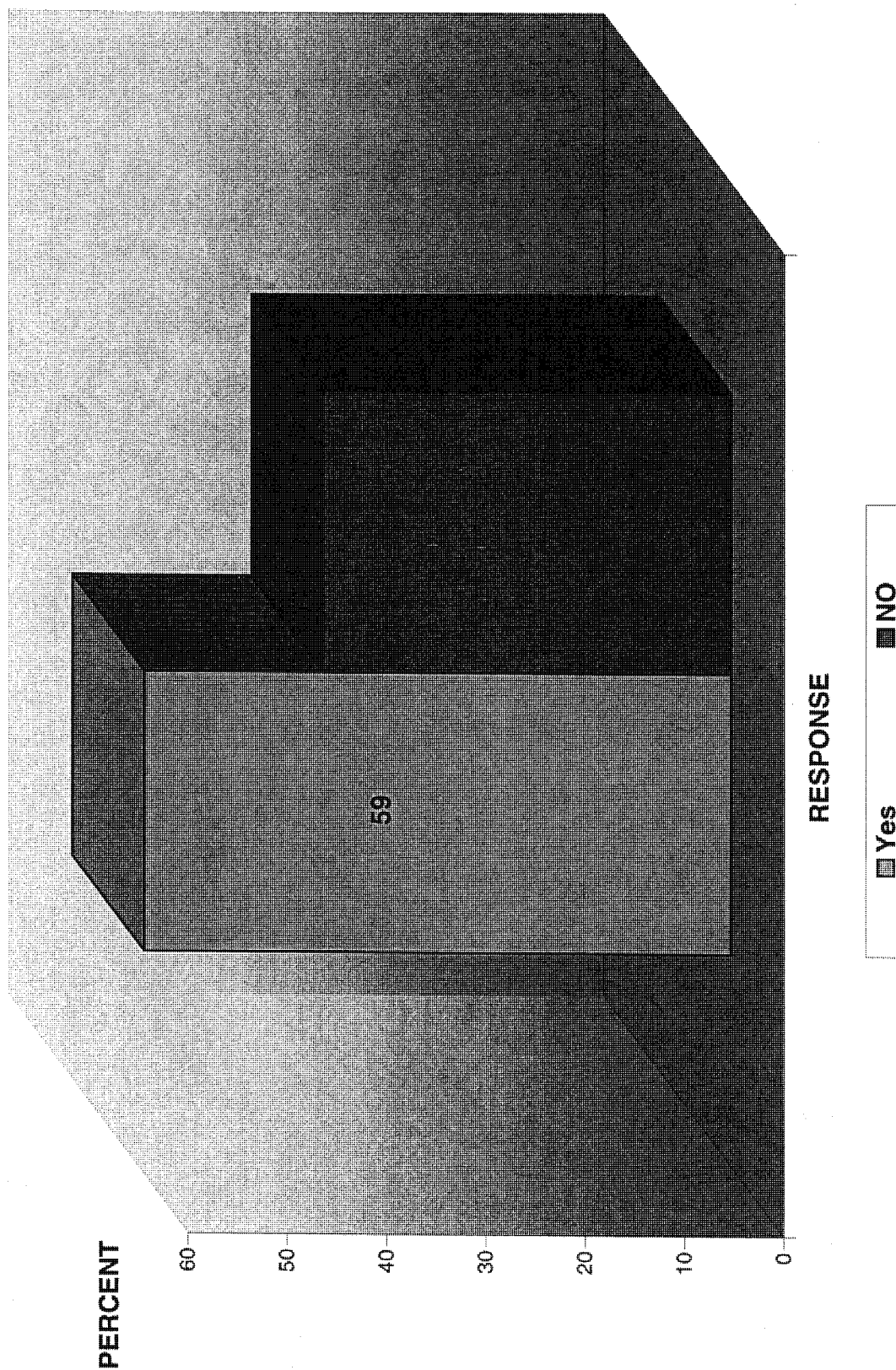
Now that you know about *New Mexico Chile*, will you purchase more?

☐ Yes ☐ No

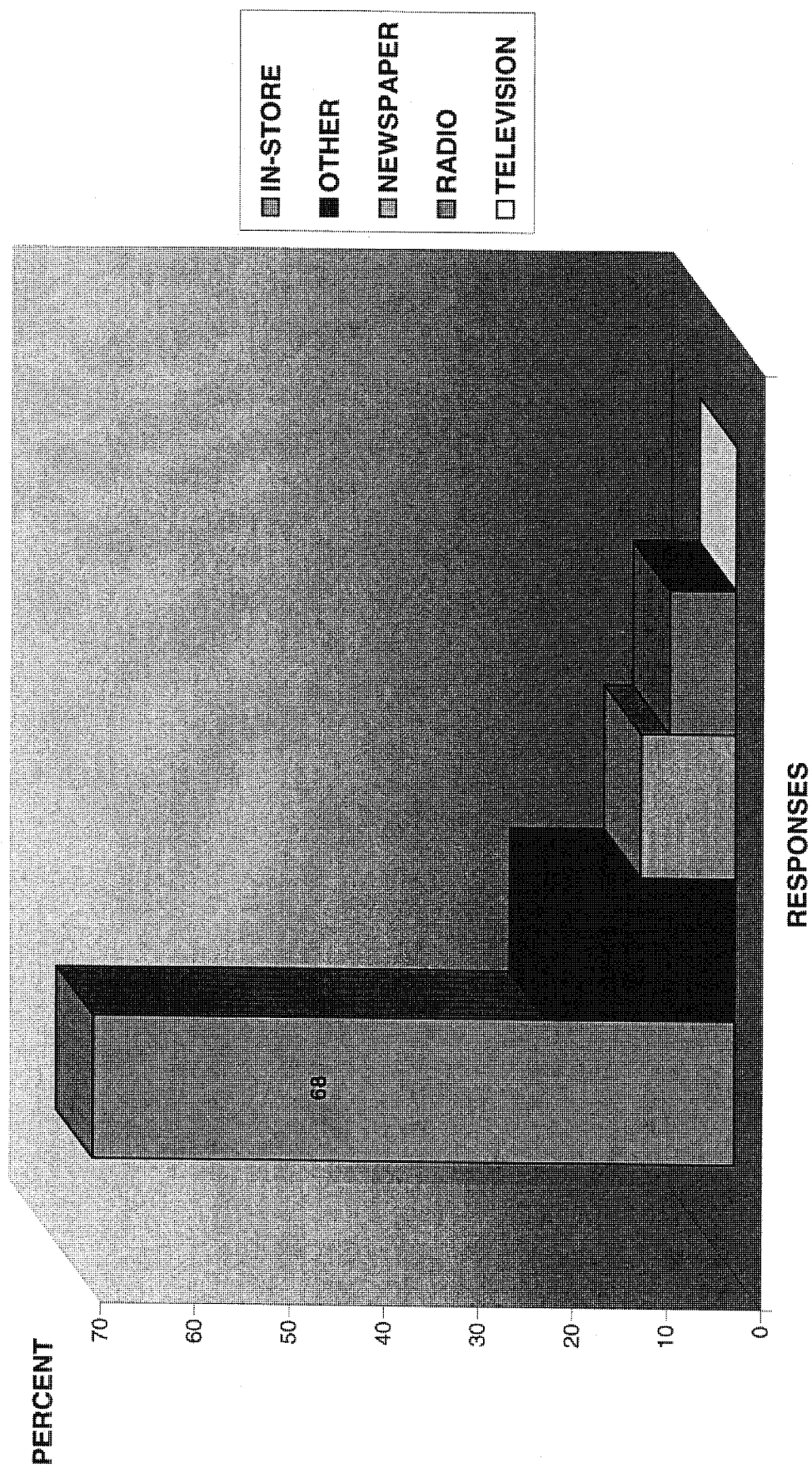
Comments: _____

THANK YOU!!!

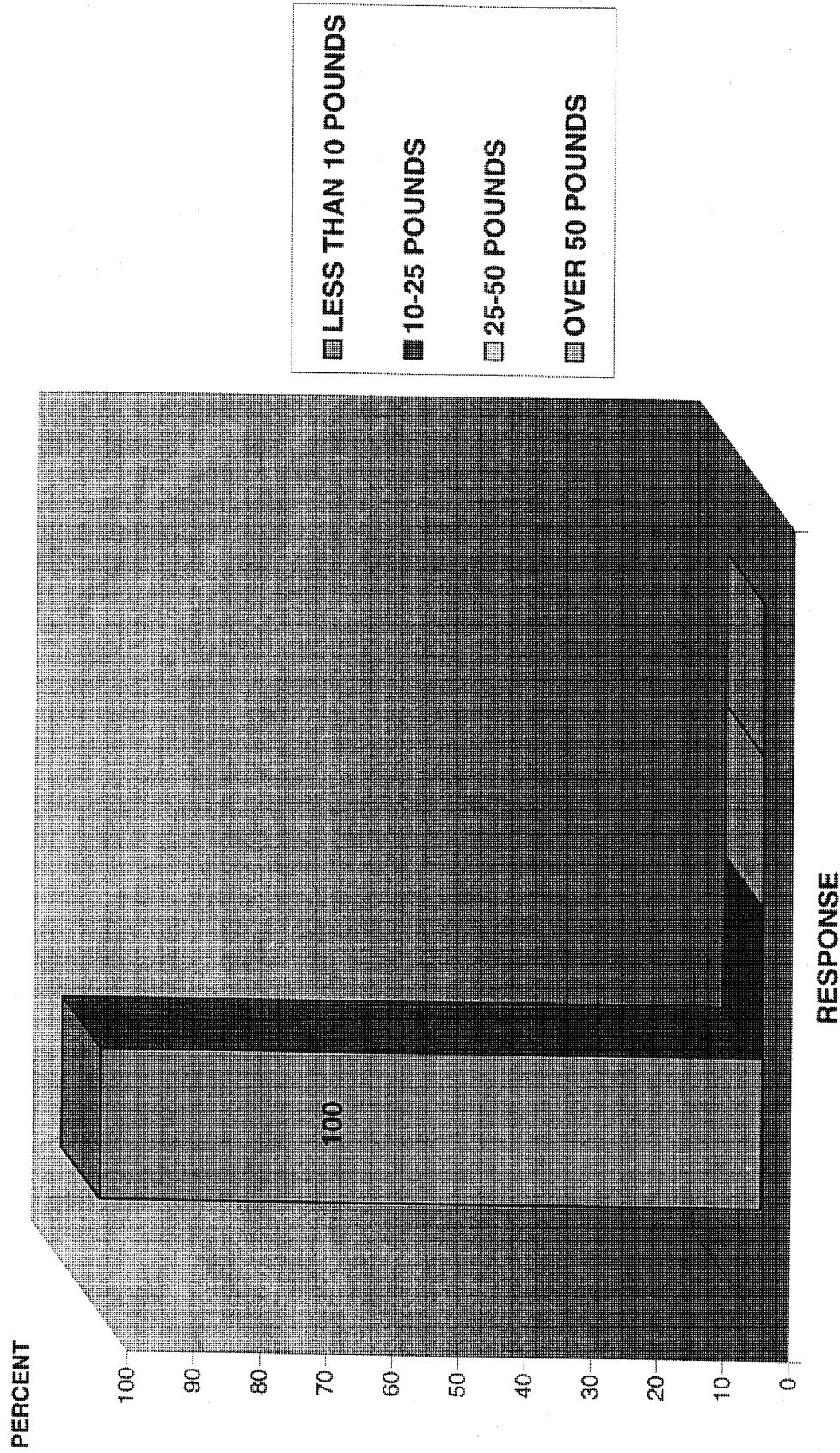
FIRST PURCHASE OF NEW MEXICO GREEN CHILE



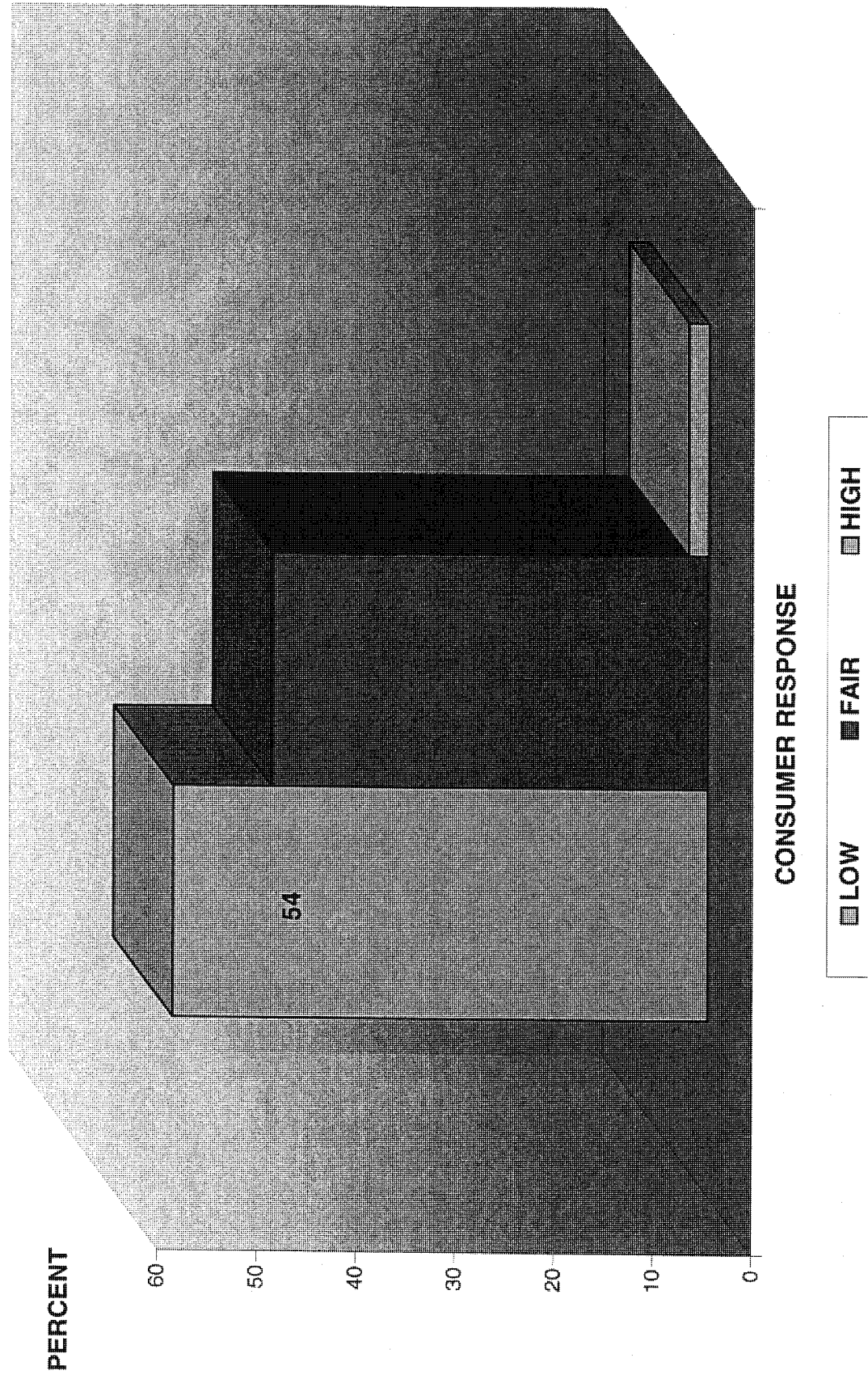
WHERE DID YOU HEAR ABOUT NEW MEXICO GREEN CHILE?



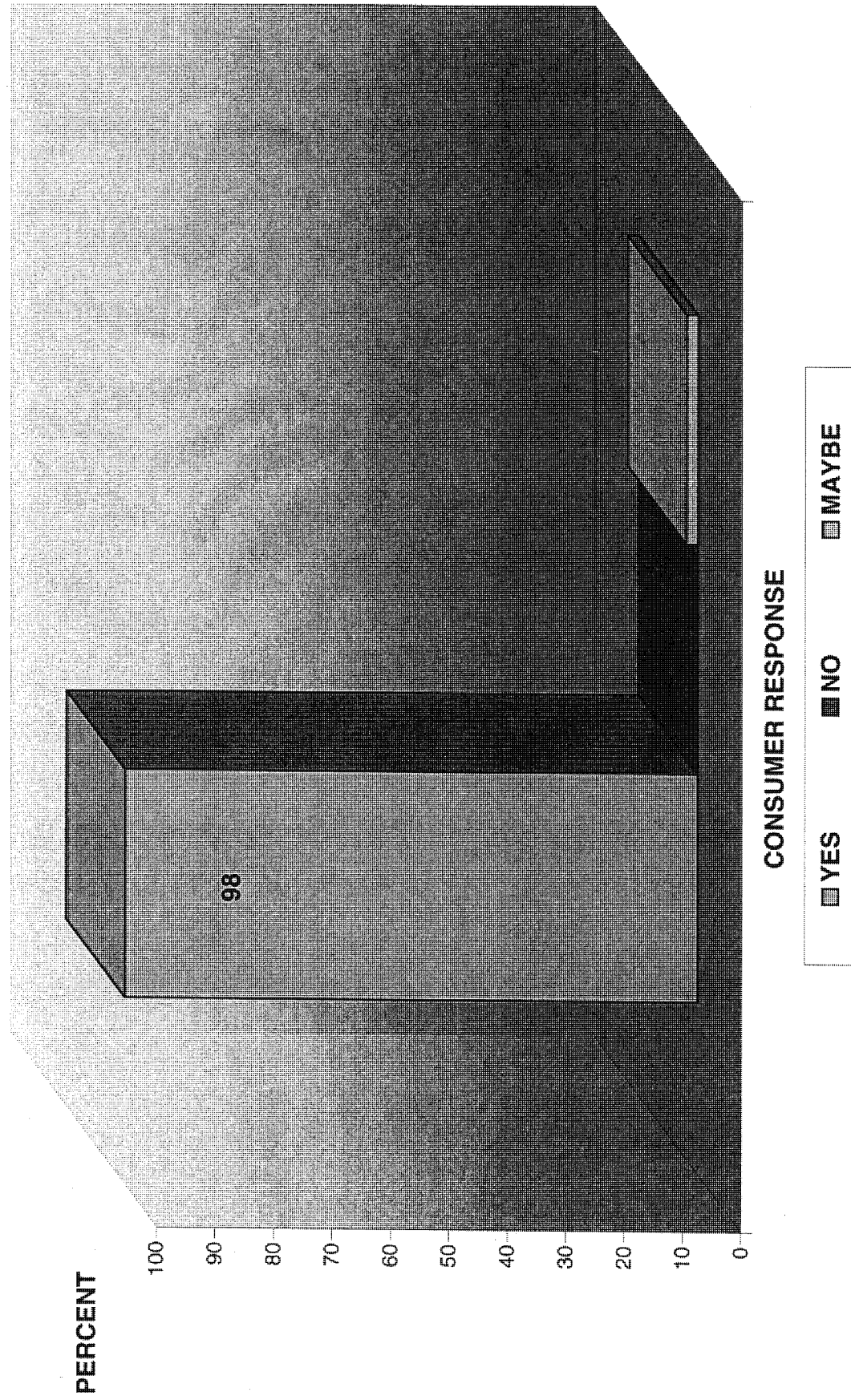
HOW MUCH NEW MEXICO GREEN CHILE DID YOU BUY?



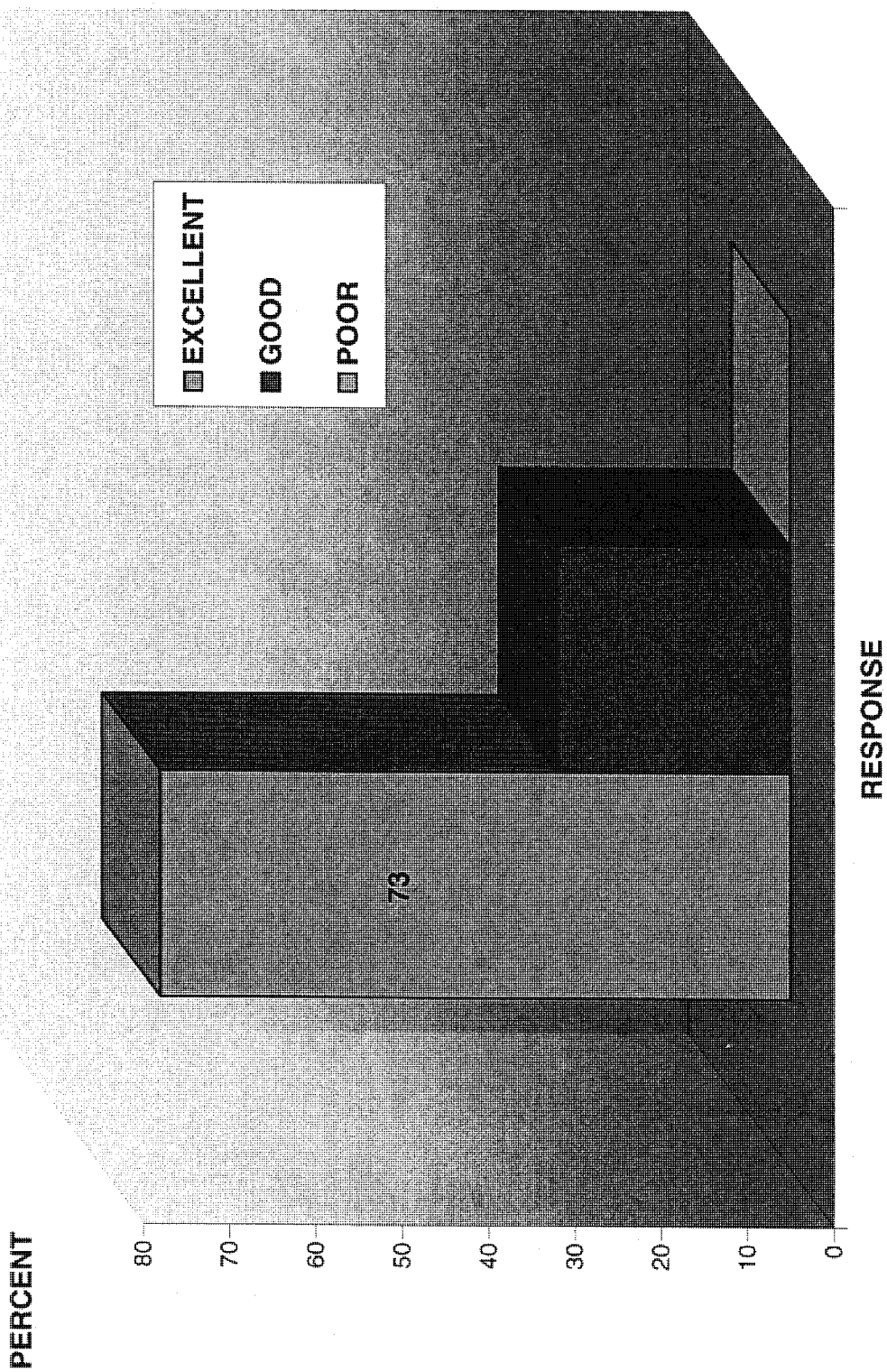
CONSUMER PRICE EVALUATION FOR NEW MEXICO GREEN CHILE



FUTURE PURCHASER OF NEW MEXICO GREEN CHILE?



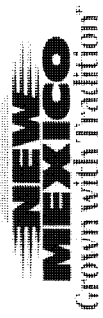
QUALITY OF NEW MEXICO GREEN CHILE





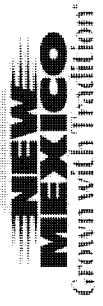
**NEW MEXICO
Green Chile.
ROASTING
WITH Tradition**





Green Chile Stew

- 1 1/2 lb. lean stew meat (approx. 3/4" cubes)
- 1/2 medium onion, chopped
- 3 c. water
- 3-4 cloves garlic, minced
- 8-10 roasted, peeled, and diced New Mexico green chiles
- 2-3 potatoes, diced
- Salt to taste
- 1/4 t. cumin (optional)



Chile Rellenos

- 1/2 inch of oil in frying pan, heated until hot
- 8 long New Mexico green chiles, roasted and peeled
- 8 finger size pieces of American, Jack, Cheddar or Acadero cheese
- 1/2 c. flour
- 4 large eggs, seperated
- 1/2 t. salt
- 1 T. flour



Green Chile Chicken Enchilada Casserole

- 3 chicken breasts, cooked and shredded
- 2 c. roasted, peeled and chopped New Mexico green chile
- 1 26 oz. can Cream of Chicken soup
- Milk (Use Cream of Chicken can)
- 2 c. shredded cheese
- 1/4 c. onion, chopped
- 10-15 corn tortillas, torn into quarters
- 1/4 t. salt
- 1/4 t. pepper
- 1/4 t. garlic powder

New Mexico Department of Agriculture

Instructions for Freezing Green Chile

Selection

Choose chile that is bright green, smooth, symmetrical, heavy for its size, mature, and crisp.

Blistering

Blistering the chile will remove the tough outer skin. The skin may then be removed before or after freezing.

Oven or Broiler Method - Place chiles in a hot oven or broiler at 400-450°F for 6-8 minutes or until skin blisters away from the flesh of the chile.

Range-Top Method - Cover gas or electric burner with a layer of heavy wire mesh and place chiles on mesh once it's hot. Remove once skin is blistered.

Outdoor Grill Method - Place chiles on a charcoal or gas grill about 5-6" above heat source. Remove once skin is blistered. After blistering, chill chiles immediately to ensure food safety.

Peeling After Blistering

Removal of the outer skin is easier after freezing. As you peel the chile, (either before or after freezing), remove seeds and veins. Be sure all processing surfaces, equipment, and packaging containers are clean.

Packaging

Unpeeled Chiles: Pack whole chiles in plastic bags or wrap in heavy aluminum foil or freezer wrap. Remove all air and seal.

Peeled Chiles: Whole or diced, peeled chiles can be packaged in glass, metal, or plastic containers. Leave 1/2" of head space and seal.

Freezing and Storage

Freeze chiles immediately after packing. Freeze and store at 0°F or below. Chile needs to freeze within 24 hours. For quickest freezing, place packages against freezing plates or coils and leave space between packages to circulate air freely. Do not over pack the freezer.

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New Mexico State University
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